

# Brand Strategy



# brand research

## concept

Finance Lobby is a two-sided, online marketplace that makes it easy and efficient to find and make perfect-fit deals

## audience

Commercial real estate lenders, both bankers and private money lenders, constitute the supply side of the marketplace and commercial real estate brokers the demand

## recommendations

Paid Ads

Associations

SEO

Press



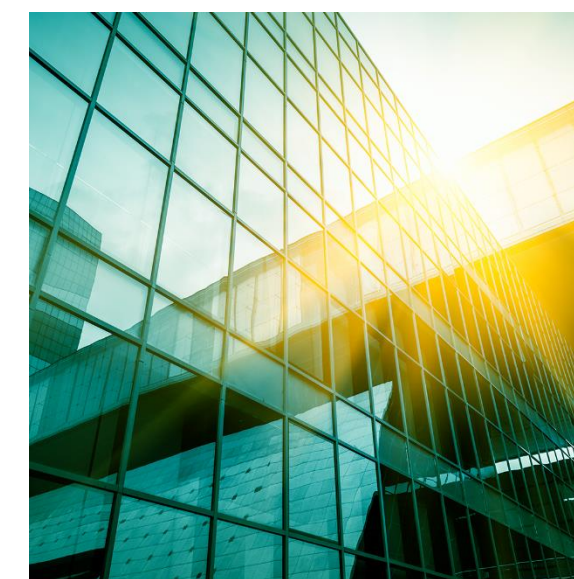
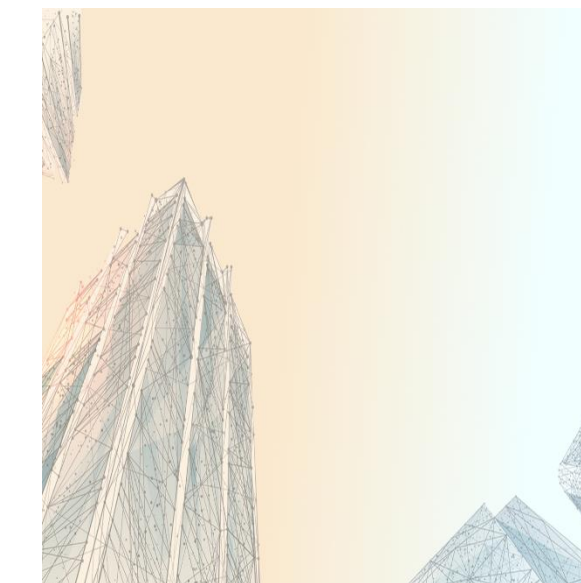
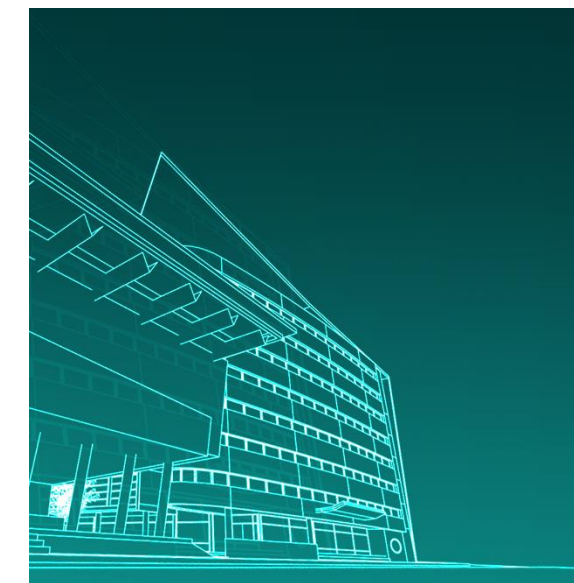




# moodboard

## the big idea

Finance Lobby is credible, simple, and transparent. The platform is designed for brokers who need to efficiently find a lender in a complex and fragmented marketplace and for lenders to spend time only on deals that will yield results. Imagery is high contrast, sleek, engaging, and warm, which emphasizes the satisfaction feel from making perfect, uncompromised deals. Subjects include a person holding a phone, working in front of a computer, or in front or inside commercial properties. Real estate is digitized, crisp and beautiful.







# recommended branding

## TYPOGRAPHY

Circular Std / Book

abcdefghijklmnopqrstuvwxyz  
~!!@!\$#%\$&^

Avenir LT Std / 35 Light

abcdefghijklmnopqrstuvwxyz  
~!!@!\$#%\$&^

## LOGO



**FinanceLobby**  
The CRE Financing Marketplace

#045d63



#F7ab42



#118f8c



#2f3034



#8f1152







# BRAND VOICE

## TONE

Informative, helpful, straightforward

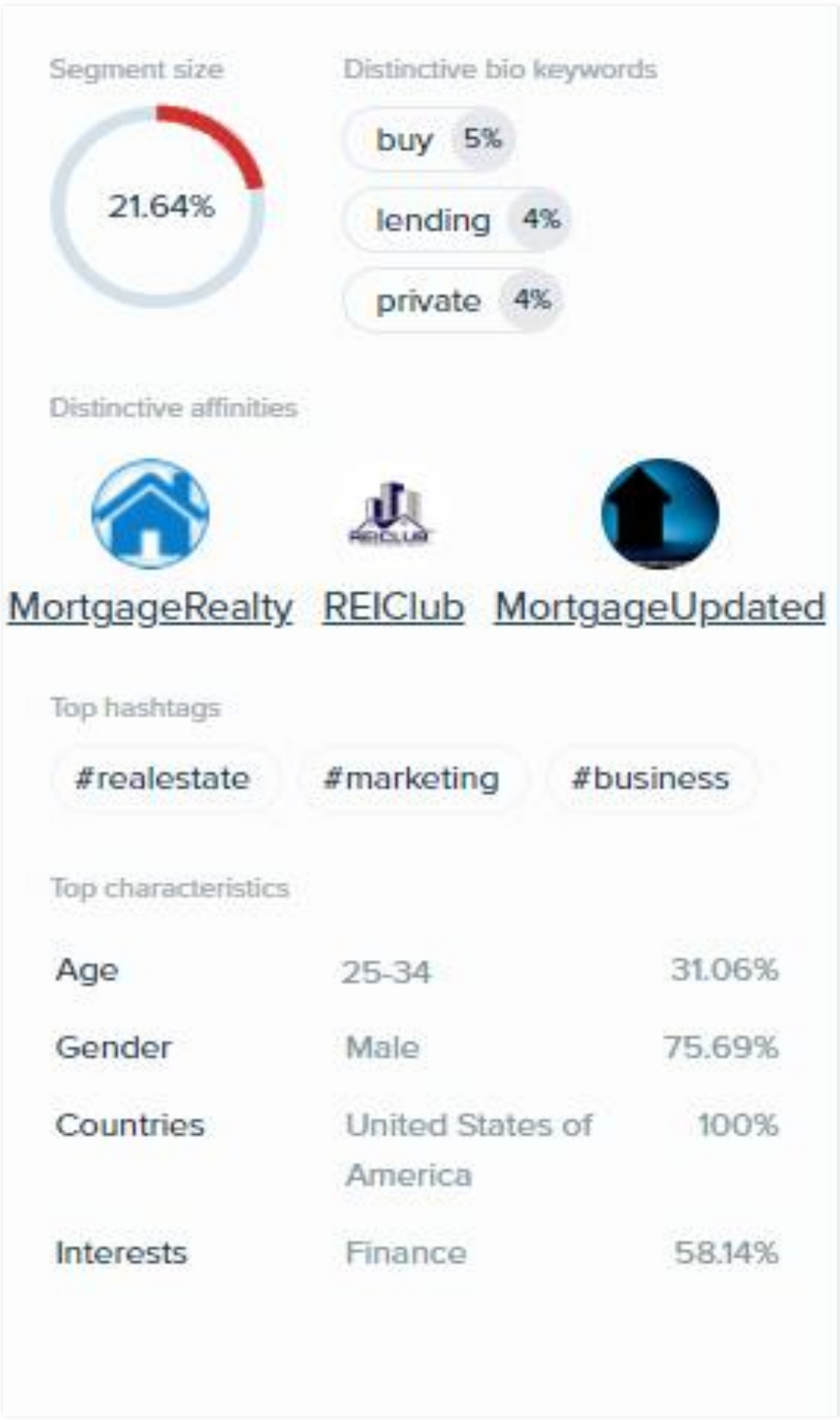
## VOICE

Whether it's communicating about the app itself or the commercial real estate financing world at large, the Finance Lobby voice should always enact its tagline: seriously simple. Short, direct sentences and efficient storytelling underscore the brand's tech-forward approach to an easy, accessible way to finance real estate. Finance Lobby won't hesitate to share information or offer to help, but it's calm, not too eager, and never, ever at risk of overselling.

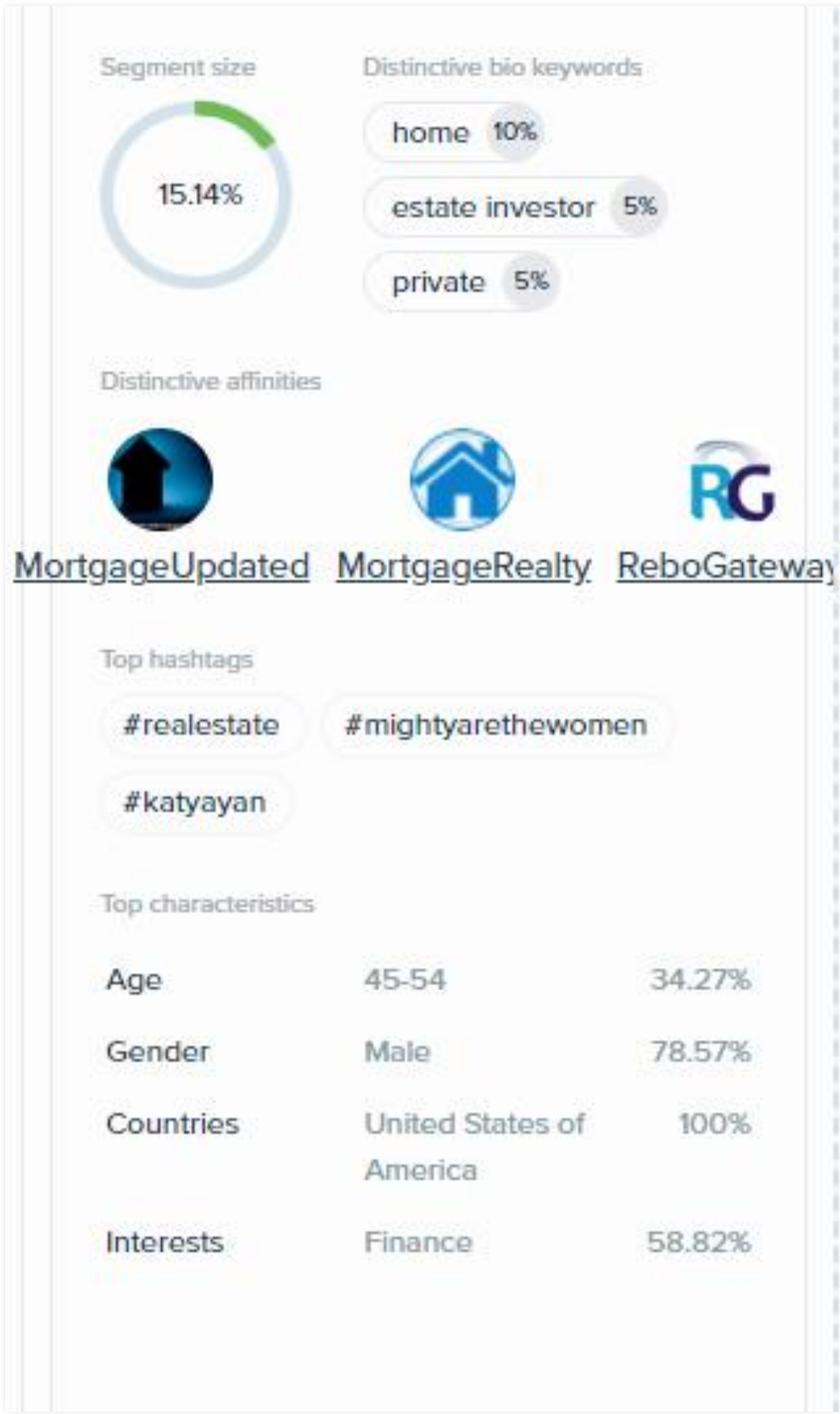


# AUDIENCES

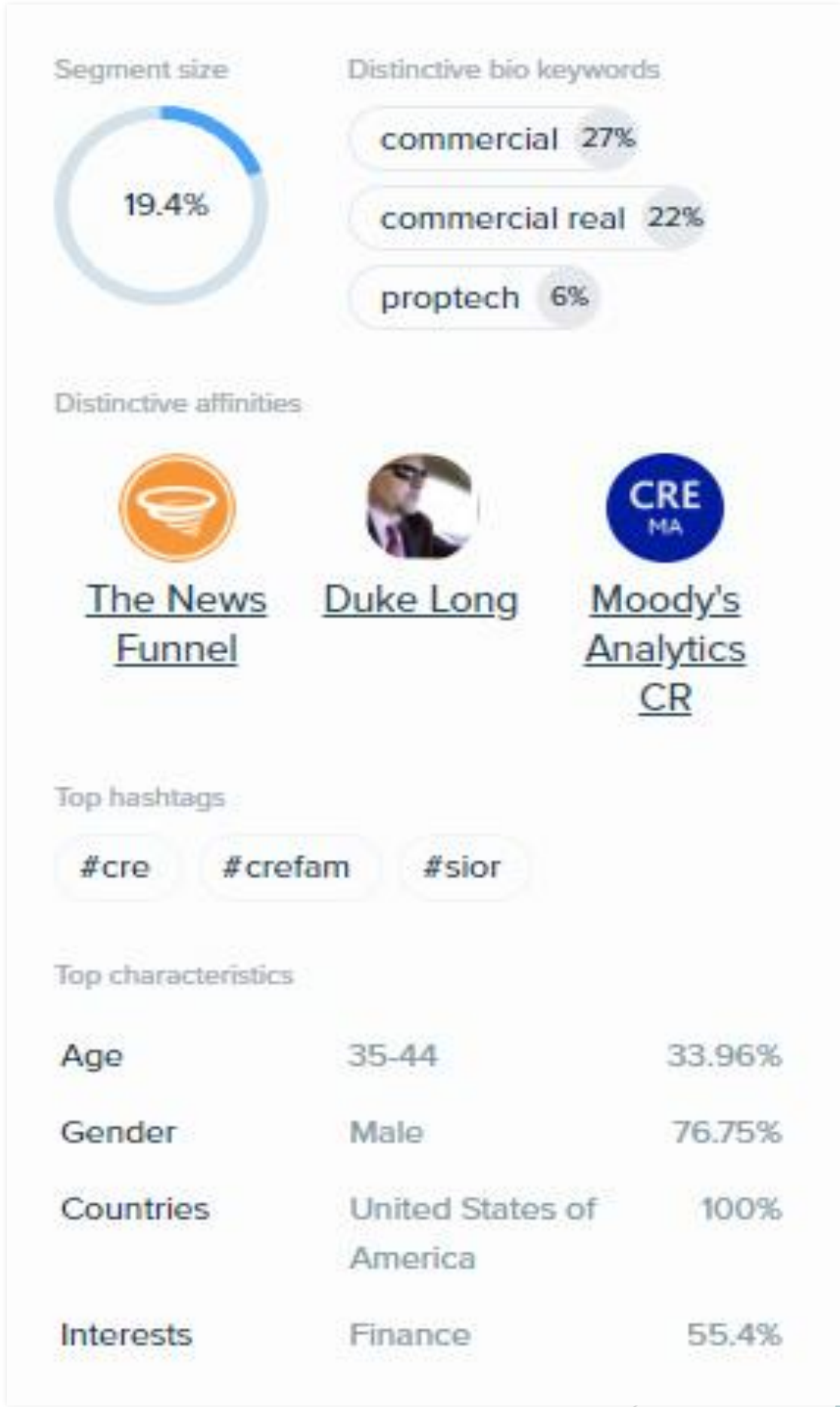
## CRE Mortgage Broker



## Commercial Lender



## Private | Hard Money Lender







AGE	47
OCCUPATION	Commercial Mortgage Broker
STATUS	Married w/ Adult Kids
LOCATION	Fort Lauderdale, FL
INCOME	\$200,000 +
EDUCATION	Bachelors in Business

# HARRIED HEATHER

## GOALS

Find, solicit, and evaluate qualified applicants for commercial real estate loans.

- Satisfy loan quotas with creditworthy deals
- Update job knowledge on types of loans available
- Develop referral networks

## INTERESTS

- Children, health, economic empowerment, environment, science and technology, education

## ONLINE BEHAVIOR

**READS:** Forbes, WSJ, Entrepreneur, Business Insider, Inc, The Economist, Fortune, Fast Company, Yahoo Finance

**WATCHES:** US Small Business Administration, Commercial Capital Training Group, NFIB, Melinda Emerson, Kevin O’Leary, Barbara Weltman, Daymond John

**SHARES:** #smallbusiness, finance, smallbiz, loans, cre, financing, businessloans

**LISTENS:** Big Ideas for Small Business, Fintech One-on-One, The Growth Show, Business Unusual with Barbara Corcoran, Marketing Smarts for Marketing Profs, Addicted to Success





AGE	43
OCCUPATION	VP
STATUS	Married with kids
LOCATION	Jersey City, NJ
INCOME	\$200,000 +
EDUCATION	Bachelors in Management

# THOURGH THEODORE

## GOALS

Exceed bank quotas with deals that meet the bank’s current loan portfolio and policies

- Build relationships with clients
- Make deals that don’t go bad
- Get promoted by the board

## INTERESTS

- Education, children, economic empowerment, social services, politics, health, science and technology,

## ONLINE BEHAVIOR

**READS:** Wall Street Journal, Forbes, NY Times, The Economist, Bloomberg, CNN

**WATCHES:** FDIC Channel, Jim Marous, BAI, Finovate TV, Brett King, FinTech Futures

**SHARES:** #banking, communitybanks, banklocally, smallbusiness, cybersecurity, creditunions, fraud

**LISTENS:** BAI Banking Strategies, Main Street Banking, Breaking Banks, Treasury Talks





AGE	42
OCCUPATION	Loan Officer
STATUS	Married with kids
LOCATION	Chicago, IL
INCOME	\$200,000 +
EDUCATION	Masters in Finance

# KNOWLEGEABLE NICK

## GOALS

Find, solicit, and evaluate qualified applicants for commercial real estate loans.

- Satisfy loan quotas with creditworthy deals
- Update job knowledge on types of loans available
- Develop referral networks

## INTERESTS

- Education, children, health, economic empowerment, human rights, science and technology, real estate, investing, travel, sports

## ONLINE BEHAVIOR

**READS:** Wall Street Journal, Forbes, Inman, Bloomberg, The Economist, MarketWatch, TechCrunch

**WATCHES:** BiggerPockets, Jim Ingersoll, RealtyTrac, Lennar, FreddieMac, The Rich Dad Channel, Grant Cardone, Mark Furgeson

**SHARES:** #realestateinvesting, investing, mortgage, cre, realestateinvestor, property, multifamily, hardmoney

**LISTENS:** Think Realty, Bigger Pockets, REIClub, Retipster, OPM Mastery



# Content Strategy



# ENGAGEMENT OUTCOMES

## THINK

- Online marketplaces for the commercial real estate industry are inevitable
- Finance Lobby is the leading marketplace where I will get the widest range of loan options
- Finance Lobby is easy to use

## FEEL

- **Joy:** “I find that I can do the parts of my job that I don't love much more efficiently. And that makes me feel better overall. I'm happier when I'm able to work smarter, not harder.”
- **Confidence:** “I'm always looking for ways to improve my service and product offerings. And with their software and service I know I deliver the best results for my clients.”
- **Success:** “My membership has helped me be more successful in my business by giving me more deals and repeat clients. I am so grateful for the ways it has helped me grow and thrive in my business.”
- **Trust:** “They never overpromise or make unrealistic claims about what they can deliver. They let quality speak for itself”

## DO

- Learn
- Try
- Buy
- Refer



**ECOSYSTEM**



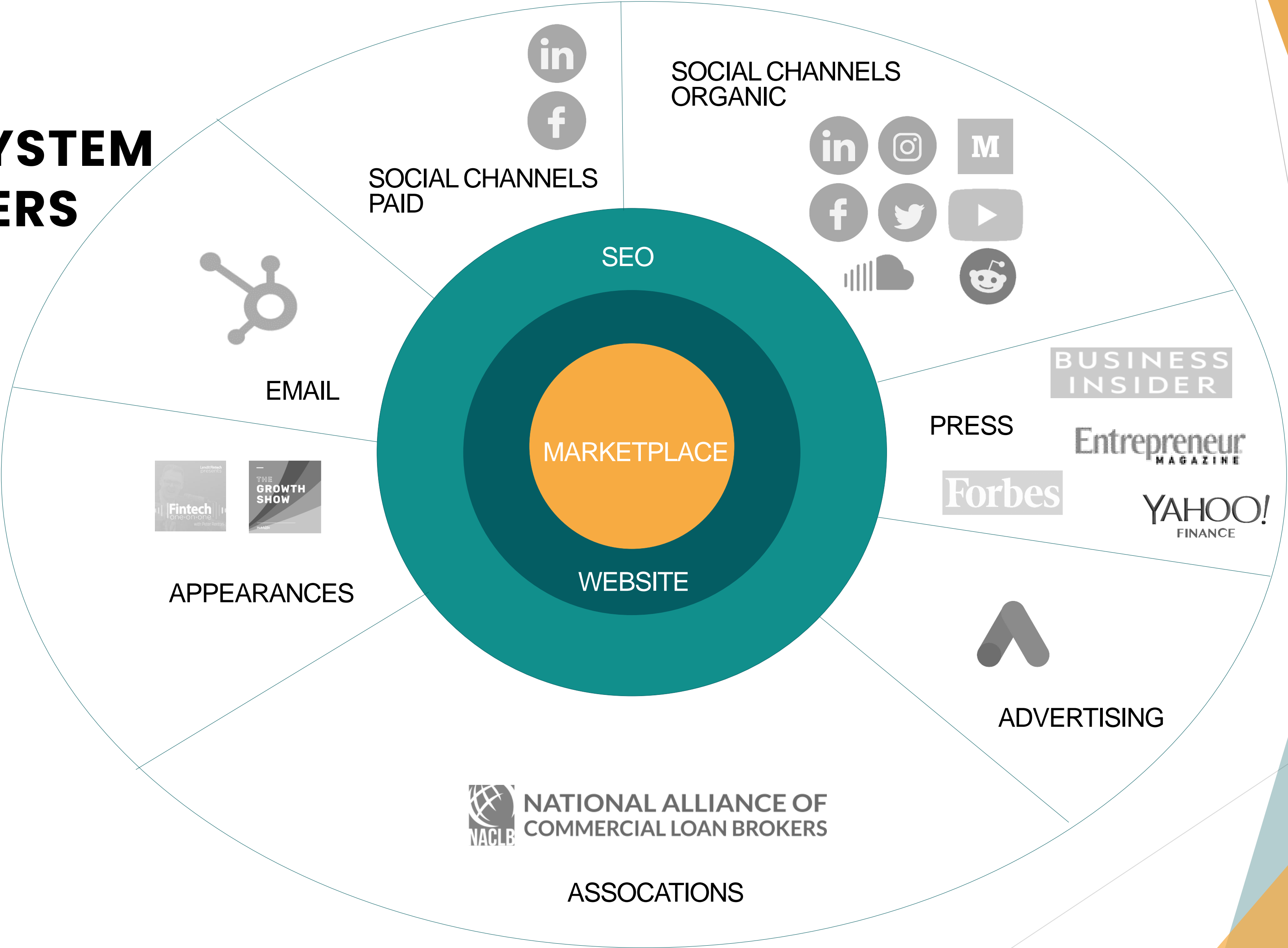


## HOW THE ECOSYSTEM WORKS

- ▶ As a rule, each content channel's audience has specific needs and expectations and seeks content that makes sense for that channel. Therefore, every content channel has an individual strategy. These distinctive strategies all work together to create the EO content ecosystem.

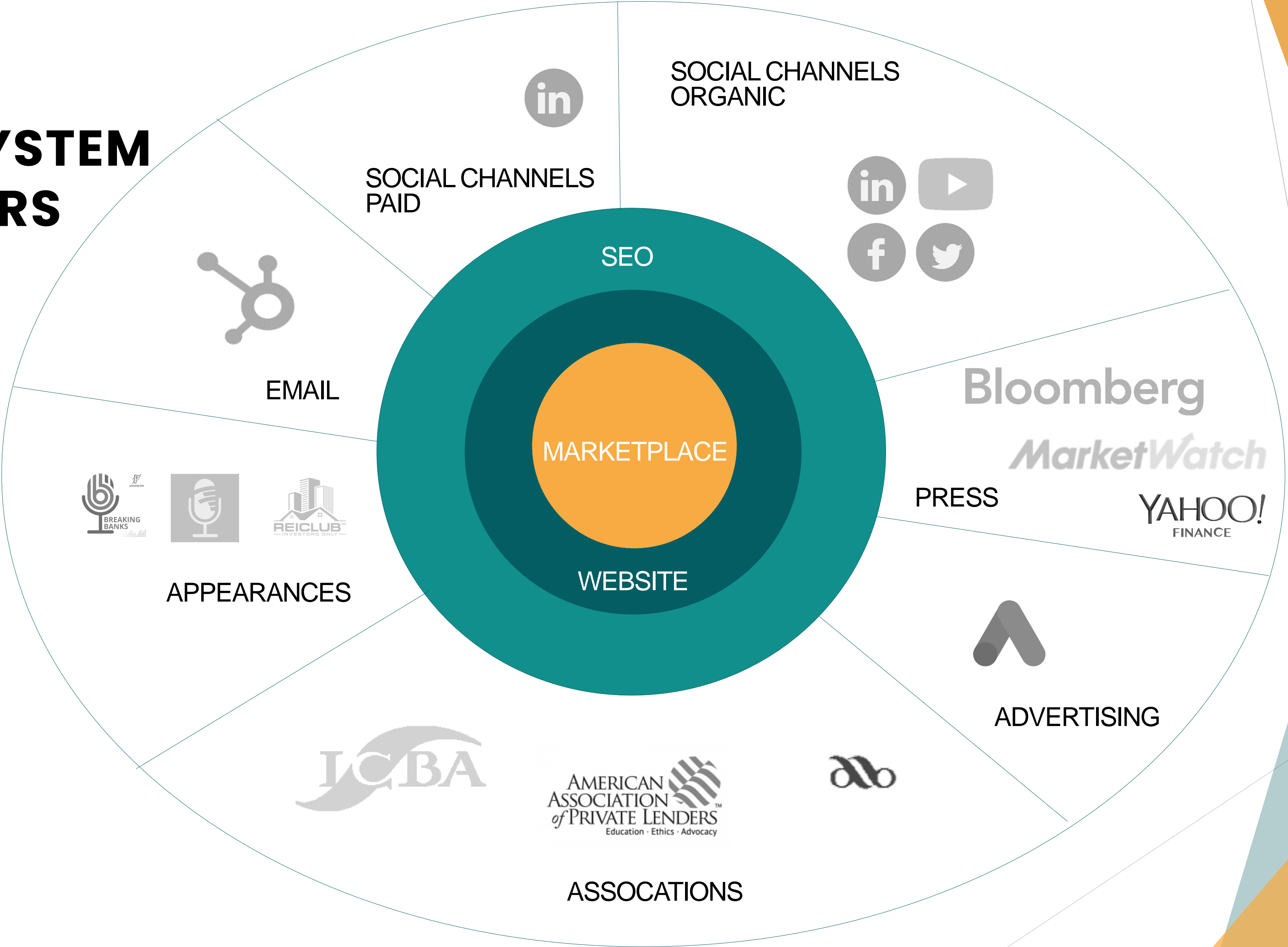


# ECOSYSTEM BROKERS





ECOSYSTEM  
LENDERS





# CONTENT TO FUEL THE ECOSYSTEM

- Our audience values content that is:
- Anchored on long-form – more than 2k and up to 10k words in length
  - Complemented with video, images, illustrations, and text to enable effective storytelling
  - Factual and backed by data, press and/or influencers.
  - And .... no newsletters needed. This is the least preferred form of content for both lender and broker audiences

blogs   videos   testimonials   podcasts   infographics   interviews   ads  
ebooks   press releases   articles   original research   calculators  
contests   forums   email   landing pages   sales tools



# APPROACH



# CONTENT STRATEGY STATEMENT

business goals

The content we produce helps Finance Lobby build category and brand awareness, boost website traffic, while escorting visitors through their buying journey — from awareness to advocacy.

audience

method

We will do this by providing cross-funnel, forward-thinking content that helps commercial real estate lenders and brokers feel motivated and empowered to explore, test, implement and advocate for the best practices and technologies that make their industry and business more efficient and effective.

value



# CONTENT IS REFLECTIVE OF BRAND VOICE

## BOLD

- Confident this is a powerful new approach that will improve the industry at large

## TRUSTED

- Grounded in data or backed by trusted influencers. We don't exaggerate

## APPROACHABLE

- Unpretentious, we don't use words that require a dictionary or sentences that read like a novel

## INFORMATIVE

- Resolutely committed to creating only researched, informative content that brings value to our customers

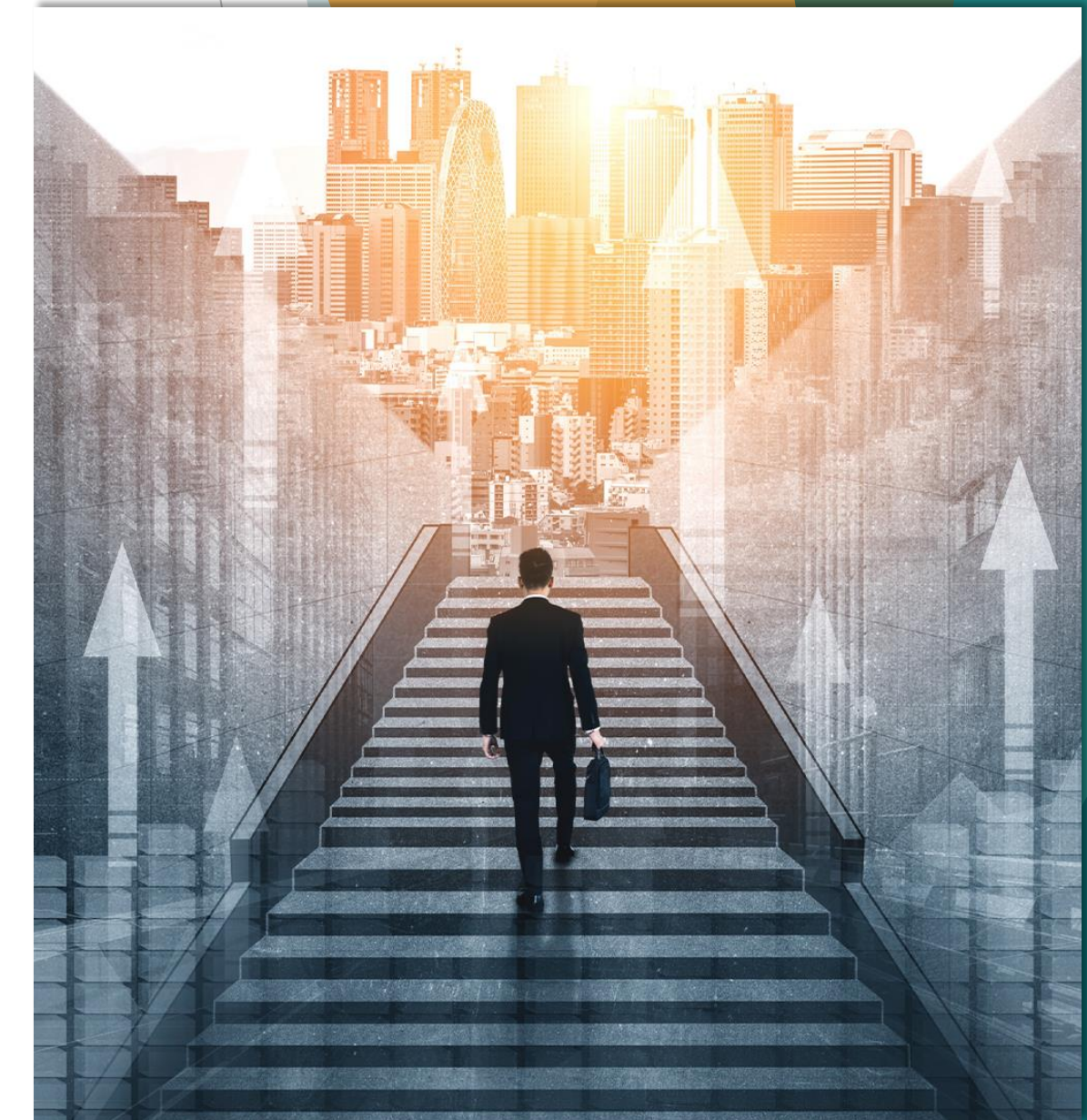
## OPTIMISTIC

- CRE has it's ups and downs, but our perspective is positive on industry direction irrespective of market growth



# CONTENT THEMES

- ▶ Content themes inform the content across the digital ecosystem and are not exclusive to just one channel.
- ▶ **JOY:** “I find that I can do the parts of my job that I don't love much more efficiently. And that makes me feel better overall. I'm happier when I'm able to work smarter, not harder.”
- ▶ **CONFIDENCE:** “I'm always looking for ways to improve my service and product offerings. With their software and service, I know I deliver the best results for my clients.”
- ▶ **SUCCESS:** “My membership has helped me be more successful in my business by giving me more deals and repeat clients. I am so grateful for the ways it has helped me grow and thrive in my business.”
- ▶ **TRUST:** “They never overpromise or make unrealistic claims about what they can deliver. They let quality speak for itself”





# CONTENT SERIES

- FL’s content series speak to our themes and audiences, inform the editorial approach and create consistency across platforms to build brand presence for audiences.

TIPS FOR SUCCESS

TESTIMONIAL TUESDAY

TECH IN CRE

BROKERAGE BEST PRACTICES

DONE DEALS

“

*The Finance Lobby platform well exceeded my expectations. It was incredibly easy to post a deal, and I did not expect to have three offers within less than 24 hours, at a high quality and with the conditions we were looking for. Honestly, Finance Lobby moved quicker than we were prepared (which is a good problem to have!) and we will be re-posting the deal in 60 days when we will actually be closer to execution.*

”

- Ian Derby, Enhance Property Solutions

<u>Location</u>	<u>Closed</u>
Lakeland, FL	April 2022
<u>Amount</u>	<u>Asset Type</u>
\$35 Million	Construction Loan

**DONE DEAL**



EDITORIAL PLANNING











# CONTENT SPECTRUM

- ▶ Putting content themes and series together gives us insight and helps us plan the editorial mix.

	Monday	Tuesday	Wednesday	Thursday	Friday
Tips for Success	Set an internal intention to improve in small ways				
Testimonial Tuesday		Inspire with positive peer experiences			
Tech in CRE			Build knowledge and confidence in technology		
Brokerage Best Practices				Boost confidence with proven strategies	
Done Deals					Celebrate success



# One Week Editorial Calendar

	Su	M	T	W	Th	F	S
		TIPS FOR SUCCESS	TESTIMONIAL TUESDAY	TECH IN CRE	BROKERAGE BEST PRACTICES	DONE DEALS	
  							
							
 							
							
							
 							



# VIDEO ADS

- ▶ In addition to our regular content series, we also recommend creating several 10 to 30 second videos that serve as advertisements for xx. Your audience by 8.7x prefers video content over all other forms. These short videos will highlight the integrity of xx as a brand and the value and superior quality of the marketplace.

# PUBLIC RELATIONS AMPLIFICATION

As a new brand in a relatively tech-hesitant community, a top priority is to build credibility. Your audience reads and trusts these publications ~ each of them has over 25% reach.

You can build trust by affiliating your brand with these brands by pitching or sponsoring content. These brands also have high domain authority which will support your SEO.



**Inc.**



**MarketWatch**

**YAHOO!**  
FINANCE

**Forbes**

**BUSINESS  
INSIDER**



# MEASURING ROI

# AUDIENCE TARGETING

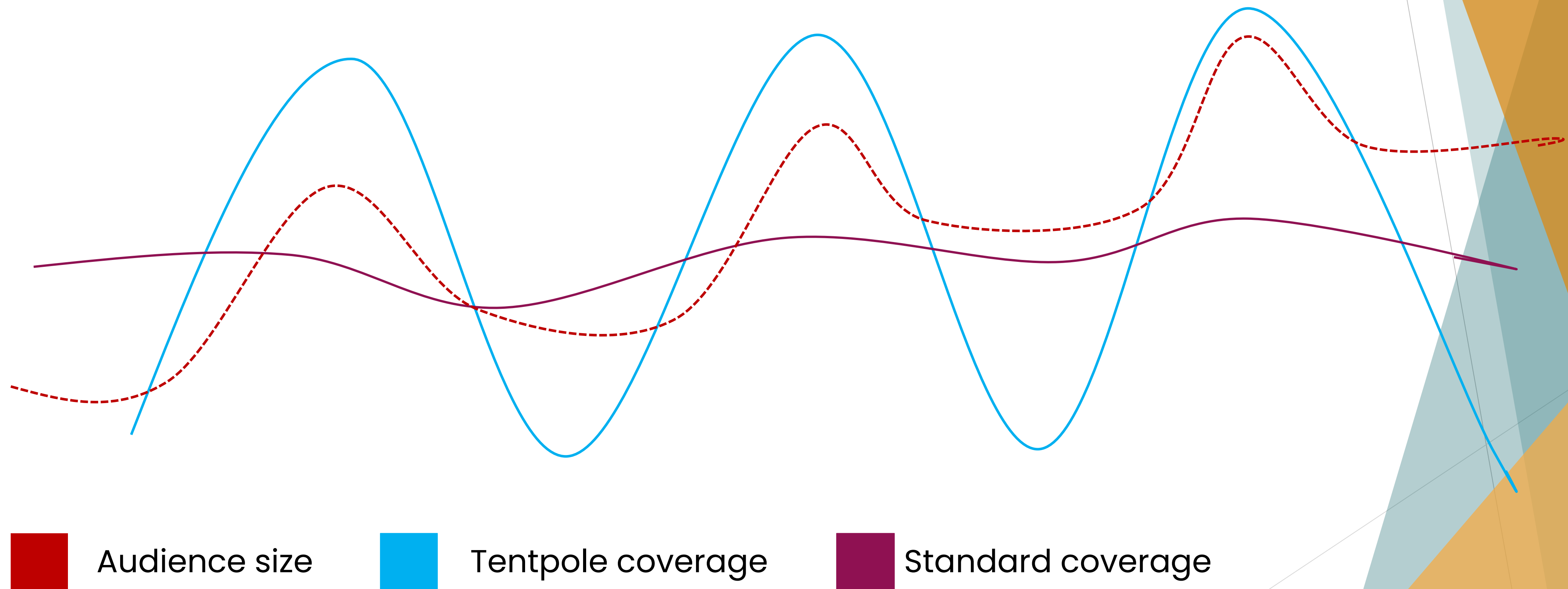
- ▶ Break down and quantify key audiences
- ▶ Track engagement over time
- ▶ Identify the gap
- ▶ Target with paid media\*
- ▶ Evaluate and identify opportunities

\* KPIs should reflect paid vs. organic goals

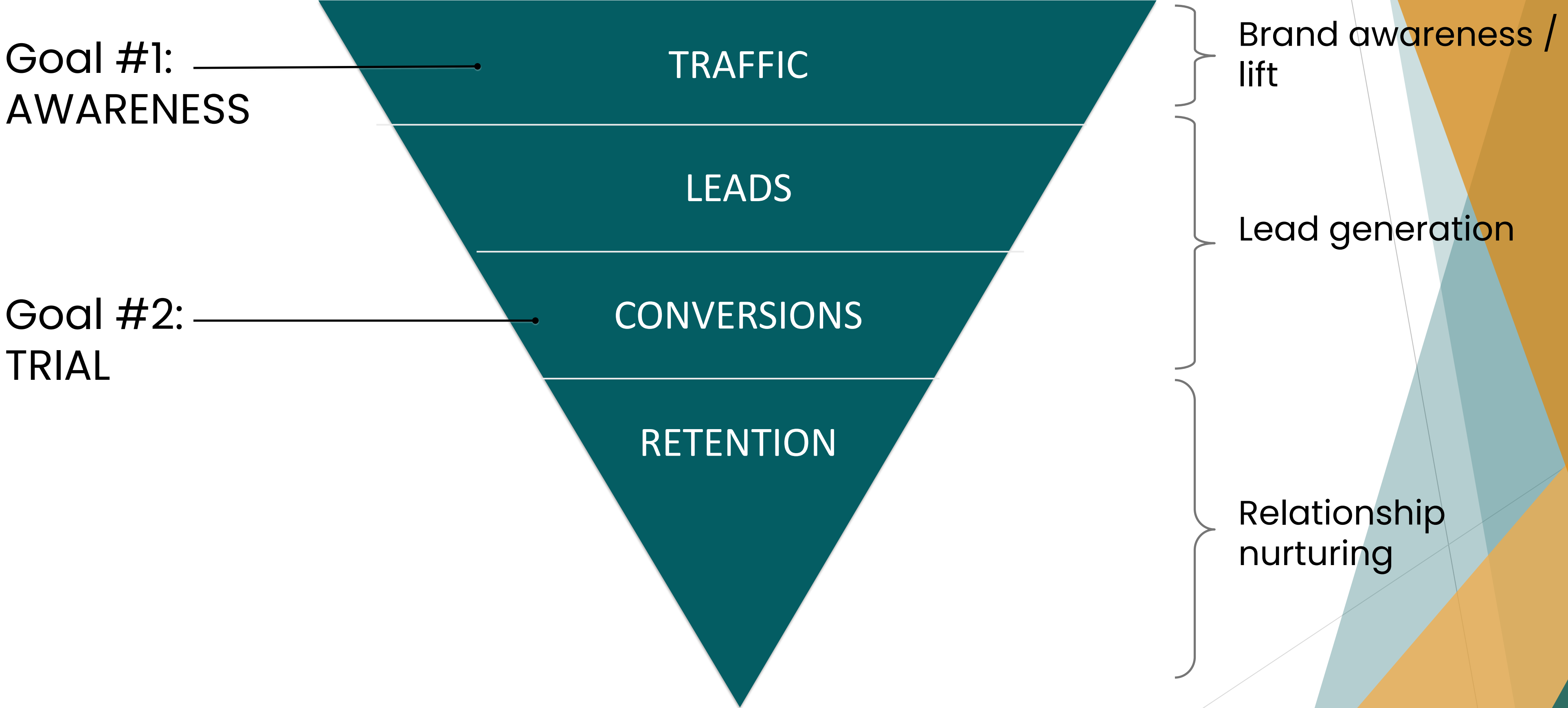


# GROWING YOUR AUDIENCE

Tentpole campaigns have more impact, and potential for audience growth, when coverage is sustained.



# MARKETING FUNNEL





# GOAL 1: AWARENESS

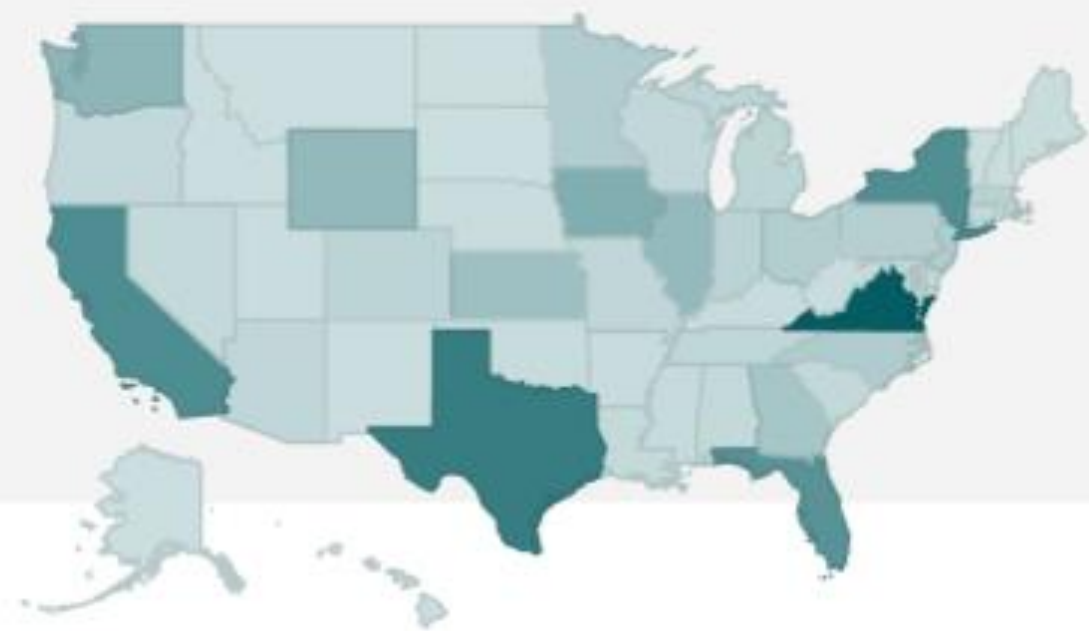
KPI	Engagement
Key Metrics	<ul style="list-style-type: none"><li>✓ New visitors/return visitors</li><li>✓ Time on page</li><li>✓ Keyword traffic (number, share of market)</li><li>✓ Engagement (likes, shares, comments)</li><li>✓ Share of audience</li><li>✓ Hashtag conversation tracking</li><li>✓ Bounce rate</li><li>✓ CPC</li></ul>

# GOAL 2: CONVERSIONS QUERY

KPI	Traffic and Conversions
Key Metrics	<ul style="list-style-type: none"><li>✓ Number of trials</li><li>✓ % conversion per channel</li><li>✓ Cost per lead by channel</li><li>✓ Cost per lead by ad</li><li>✓ Conversion rate [trial]</li><li>✓ CPC</li></ul>






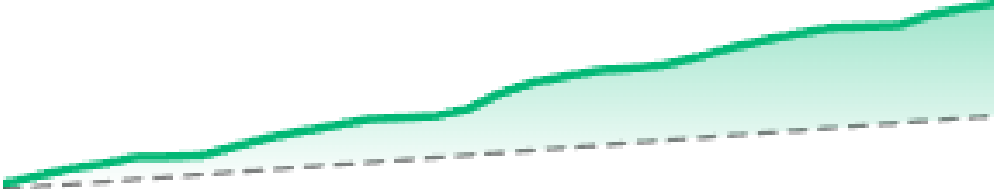





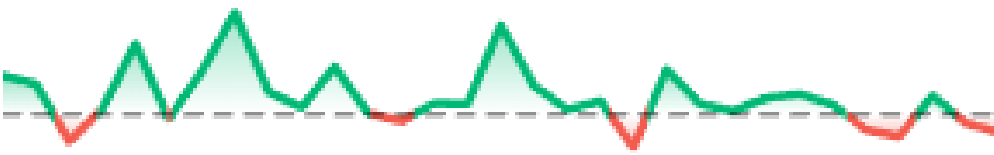





Primary Key Performance Indicators



Performance Actions



Name		Current value	Performance	Goal value
	<b>Sessions goal</b>  Finance Lobby	11,938	170% 	7,000 per
	<b>Goal Completion goal</b>  Finance Lobby	872		352 per
	<b>Goal Completion by Goal / Goal 1: Signup Form Submit goal</b>  Finance Lobby	227	105% 	215 per
	<b>SignUp Rate Goal</b>  Finance Lobby	7.3%		6% per
	<b>Bounce Rate Goal</b>  Finance Lobby	45.4%		65% per



**NEXT STEPS**

# SEO & KEYWORD STRATEGY

## Organic keywords



### SEO & CONTENT MARKETING

- ▶ Content marketing and SEO are natural complements to each other. They both fuel each other and act as the necessary gears of any successful digital marketing campaign.
- ▶ We'll start by getting insight into our competitors

Keyword	Intent	SF	Pos.	Diff.	Traffic %	Volume	KD %	CPC (USD)	URL	SERP	Upd.
+ commloan ▾	<span>N</span> <span>T</span>		1 → 1	0	9.99	210	37	7.6	<a href="http://www.commloan.com/">www.commloan.com/</a>		Mar 02
+ interest rate calculator ▾	<span>T</span>		• → 20	new	7.19	40,500	89	1.3	<a href="http://www.commloan.com/research/rate-calculator/">www.commloan.com/research/rate-calculator/</a>		Mar 07
+ cmbs ▾	<span>I</span>		11 → 11	0	6.06	5,400	60	9.4	<a href="http://www.commloan.com/cmbs-loans">www.commloan.com/cmbs-loans</a>		Mar 08
+ multifamily commercial real estate loan ▾	<span>I</span>		2 → 2	0	5.65	720	49	0	<a href="http://www.commloan.com/research/the-guide-to-...ans/">www.commloan.com/research/the-guide-to-...ans/</a>		Mar 06
+ cmbs ▾	<span>I</span>		12 → 12	0	4.16	5,400	60	9.4	<a href="http://www.commloan.com/research/what-are-cmb-...ans/">www.commloan.com/research/what-are-cmb-...ans/</a>		Mar 08
+ cmbs loans ▾	<span>I</span>		6 → 6	0	3.33	1,600	49	8.3	<a href="http://www.commloan.com/research/what-are-cmb-...ans/">www.commloan.com/research/what-are-cmb-...ans/</a>		Mar 03
+ personal financial statement for commercial loan ▾	<span>I</span>		1 → 1	0	3.09	210	45	0	<a href="http://www.commloan.com/research/how-to-build-...ans/">www.commloan.com/research/how-to-build-...ans/</a>		Mar 03
+ seo ▾	<span>I</span>		2 → 2	0	2.49	320	38	0	<a href="http://www.commloan.com/research/how-to-build-...orm/">www.commloan.com/research/how-to-build-...orm/</a>		Feb 22
+ comm'l lending service ▾	<span>I</span>		1 → 1	0	2.49	170	23	0	<a href="http://www.commloan.com/">www.commloan.com/</a>		Mar 04
+ comm'l lending service ▾	<span>I</span>		1 → 1	0	2.49	90	43	6.4	<a href="http://www.commloan.com/">www.commloan.com/</a>		Feb 13